

Lotus Notes R5 Quick Reference Guide

Introduction

About R5

Bookmarks

Home Page

Databases

Mail

Notes Calendar

To Do List

Documents

Internet Access

Index

Copyright, Disclaimer of Warranties and Limitation of Liability

© Copyright 2000 Lotus Development Corporation, 55 Cambridge Parkway, Cambridge, Massachusetts 02142. All rights reserved. Printed in the United States.

Lotus, Lotus Notes, and LearningSpace are registered trademarks and Domino is a trademark of Lotus Development Corporation. IBM is a registered trademark and the e-business logo is a trademark of International Business Machines Corporation. All other product or brand names may be trademarks of their respective companies.

You must purchase one copy of the appropriate kit for each student and each instructor. For all other education products you must acquire one copy for each user.

You may not copy, reproduce, translate, or reduce to any electronic medium or machine-readable form, in whole or in part, any documents, software, or files provided to you without prior written consent of Lotus Development Corporation, except in the manner described in the documentation.

While every reasonable precaution has been taken in the preparation of this manual, the author and publishers assume no responsibility for errors or omissions, nor for the uses made of the material contained herein and the decisions based on such use. Neither the author nor the publishers make any representations, warranties, or guarantees of any kind, either express or implied (including, without limitation, any warranties of merchantability, fitness for a particular purpose, or title). Neither the author nor the publishers shall be liable for any indirect, special, incidental, or consequential damages arising out of the use or inability to use the contents of this book, and each of their total liability for monetary damages shall not exceed the total amount paid to such party for this book.

Contents

Introduction.....	v
About R5.....	1
Viewing the Notes R5 environment	1
Opening your mail and calendar.....	2
Working with several open tasks	3
Navigating with browser-like buttons	4
Using the SmartIcons toolbar	5
Using Help	6
Bookmarks	8
Saving steps with bookmarks	8
Creating Bookmarks	9
Keeping track of bookmarks	10
Using Bookmarks effectively	12
Home Page	13
Choosing information for your Welcome Page	13
Creating a new Welcome Page	14
Setting a bookmark as your home page	15
Databases.....	16
Opening a database	16
Navigating a database.....	17
Using Views.....	18
Exploring Notes applications	19
Searching a database.....	20
Using database folders	21
Mail.....	22
Reading your mail.....	22
Replying to messages	23
Deleting unwanted mail	24
Create a message	25
Checking outgoing mail for misspellings	26
Adding a signature to outgoing mail	27
Moving a message	28

Forwarding information	29
Saving messages	30
Filtering incoming messages	31
Checking for new mail	33
Finding an address	34
Creating a contact in the address book	35
Notes Calendar	36
Checking your calendar	36
Adding calendar entries	38
Creating a new entry	39
Inviting others to a meeting	40
Responding to a meeting invitation	41
Setting up a group calendar	42
Printing your calendar	43
To Do List	44
Creating and managing tasks	44
Displaying tasks on your calendar	45
Assigning a group task	46
Documents	47
Using pens and highlighters	47
Formatting with text properties	48
Organizing content into sections	49
Creating tables	50
Adding pictures	51
Internet Access	52
Opening Web pages within Notes	52
Tracking Web pages	53
Searching the Web with Notes	54
Using your browser bookmarks	55
Getting your mail with a browser	56
Index	57

Lotus Notes and Domino are the industry's leading client/server combination for collaborative messaging and e-business solutions. Whether used together or separately, Notes and Domino give organizations the power and flexibility needed in today's global economy. Notes R5 is an integrated, Web-like environment that gives users quicker access to and better management of many types of information including Notes and Internet-based e-mail, calendar of appointments, personal contacts and to-do tasks, as well as Web pages, News Groups and intranet applications.

Whether you are new to Notes, or upgrading to Notes R5, you can use this book as a quick reference for common Lotus Notes tasks. Focusing on basic Notes concepts, this book briefly introduces and describes the procedures you use for general communication, collaboration, and Internet activities.

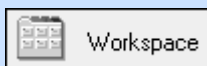
Reference material

For the latest books, reference tools, release notes, and published titles about Lotus Notes, visit the **LotusStore** at **www.lotus.com/education**.

About R5

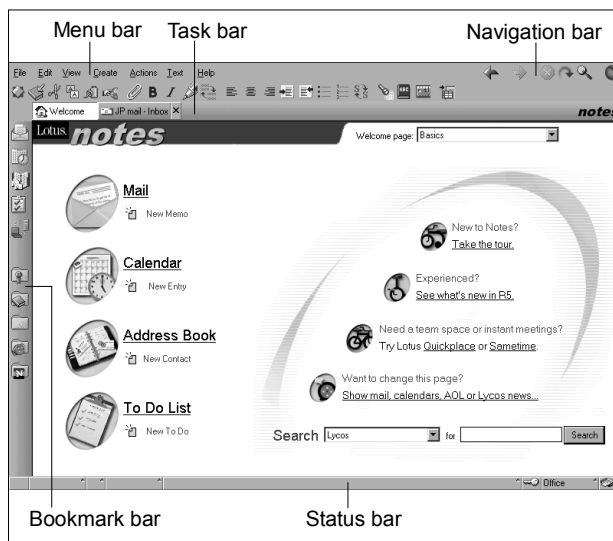
Tips

- The R4 workspace interface is available from the Databases bookmark folder. It allows you to view database icons only and to open databases as in Notes R4.x.



Viewing the Notes R5 environment

Lotus Notes R5 has a browser-like user interface, and a variety of integrated applications you use in your daily work, such as mail, calendar and scheduling, Web browsing, and discussions.



About R5

About R5

Tips

- There are links to your Mail and Calendar on the Welcome page.
- You can switch from Mail to Calendar using the icons in the Navigation pane.

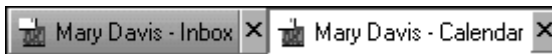


Opening your mail and calendar

The mail and calendar icons on the Bookmarks Bar open your mail and calendar.



Although they are part of the same database, each opens in a separate task window. By clicking on the task window you can switch between them.



To open your mail and calendar:

- Click the Mail icon on the Bookmarks Bar to open your mail.
- Click the Calendar icon on the Bookmarks Bar to open your Calendar.

Tips

- If the full name is not displayed in the task window, move the cursor over it to display the complete label.
- Pressing ESC closes the currently displayed window.
- You can use Ctrl-Tab to switch tasks.
- Pressing ALT+W displays the numbers for each open page. Use corresponding number keys to open a window.

Working with several open tasks

Every time you open your mail, a database, a document, or Web site, you create a new task button, which appears below the menu bar. Clicking on an active task switches the display to that page. You can have up to twenty windows open at one time.



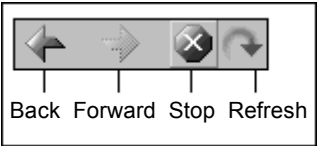
Close a task by clicking the “x” in the upper right corner of a task window, or by pressing ESC.

Tips

- Pressing CTRL+BREAK is the equivalent of the Stop navigation button.
- The F9 key can also be used to refresh a view. If items are marked for deletion, refresh prompts for approval to delete them.

Navigating with browser-like buttons

You navigate among open pages with Web-like navigation buttons.



Click this	To
Go Back	Reopen the last open page. The drop-down arrow displays a history list of the most recently open pages.
Go Forward	Reopen pages based on the pages opened with the Go Back button. The drop-down arrow displays a history list of recently open pages.
Stop	Discontinue the current operation.
Refresh	Update the information in the Notes view area.

Tips

- You can change the display of icons (including bookmarks and navigation buttons) by opening the User Preferences dialog box and choosing an Icon color scheme.

Using the SmartIcons toolbar

SmartIcons are buttons that perform an action (for example, copying selected text) when you click them. By default, SmartIcons are not displayed. You enable the SmartIcons to be displayed.



To display SmartIcons:

1. Choose **File**→**Preferences**→**SmartIcon Settings**.
2. Select the Icon Bar checkbox.



About R5

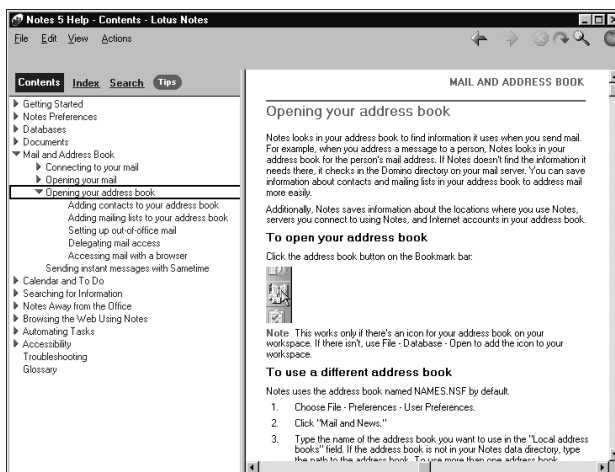
Tips

- To keep the Help window visible as you work, choose **View→Always on Top**.
- If you see a message that Help files are not available, ask your Domino administrator to add the Help databases to your mail server.
- To print topics, select one or more Help topics and choose **File→Print Topic**.

Using Help

Notes Client Help explains how to use the Notes Desktop and Notes Mail client products, introducing users to Notes features and common tasks. It opens in a separate Notes window, including a navigation pane and navigation buttons.

Use Notes Help to find more detailed information and procedures.



Using Help...

Guidelines for using Notes Help:

To open Help, choose Help→Help Topics.

To get help on your current task, choose Help→Context Help, click the Help button in a dialog box, or click the question mark in a properties box.

To jump from one topic to another, double-click blue underlined text. To return to where you were, click the left arrow at the top of the window.

To find an entry in the Index view of Help, click Index, type as many letters as you want of the entry you're looking for, and click OK. Click the triangle next to any index entry to expand its topics.

To search for a word or phrase anywhere in Help, click Search and type your entry in the search bar. You can drag the right edge of the search bar to show more search options.

Bookmarks

Tips

- To remove a bookmark, right-click on the bookmark and select Remove Bookmark from the pop-up menu.
- When you drag a task window to the Bookmark bar, it appears that you are dragging a document icon. As you drag the icon, it changes to show you when it is acceptable to drop into place.



Saving steps with bookmarks

Bookmarks are links to information or the places that are important to you. The top five bookmarks on the Bookmark Bar are your most commonly used links.



- Mail
- Calendar
- Address Book
- To Do
- Replicator

Bookmarks can point to both Notes and Internet elements, including databases, views, documents, Web pages, and news groups.



Creating Bookmarks

You can create a bookmark to any open page.



Bookmarks

To create a bookmark, you can:

- Right-click a task window and selecting Bookmark.
- Drag the task window to the Bookmark bar.
- Choose **Bookmark** when you open a Notes database.
- Choose **Create→Bookmark** from the menu.

Bookmarks

Tips

- To add your own bookmarks to new documents, open the new document and drag it to the Bookmark bar.
- You can drag the right edge of the bookmark page to adjust the width. If it seems that a bookmark folder won't open, the page may already be open and adjusted to a very narrow width.
- Use the Bookmark page menu (click the triangle in the top left corner of the page) to display database server names beneath each database bookmark.

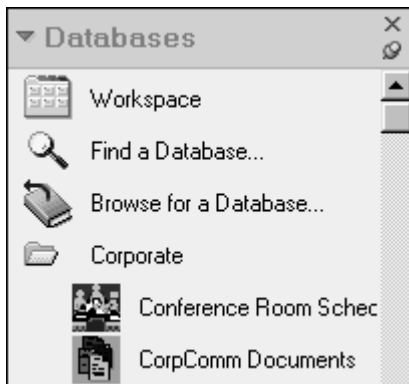
Keeping track of bookmarks

The Bookmark Bar organizes your bookmarks onto pages. Each folder on the bottom half of the Bookmark Bar opens up a page of bookmarks, including your favorite Web browser bookmarks.



- Favorite Bookmarks
- Databases
- More Bookmarks
- Internet Explorer Links
- Netscape Links

When you click on one of the bookmark folder icons, a bookmark page slides from left to right on the screen. Click anywhere in the main Notes window and it will slide back off screen. Click the pushpin icon on a Bookmark page to keep it open.



Keeping track of bookmarks...

There is a set of default bookmark folders that comes with Notes R5.

Bookmark folder	Contains
Favorite bookmarks	Links to the Welcome page, your mail, address book, subscriptions, and free time data. Use it to store your most frequently used bookmarks
Databases	<p>Links to Notes databases. If you are upgrading to Notes 5.0, the Database folder bookmark contains all workspace icons translated into bookmark folders and bookmarks. Your previous workspace pages are now folders, and the workspace icons are bookmarks inside those folders.</p> <p>Using the Database Open dialog box automatically puts a database link in this folder.</p>
More bookmarks	Internet Search bookmarks, Internet links, and a Create folder. The Create folder contains bookmarks to the kinds of documents that you frequently create in Notes, such as a new memo.
Netscape Navigator and Internet Explorer pages	The browser bookmarks from either Netscape Navigator or Internet Explorer, depending on which browser you use. If you use both, you'll find bookmarks from both here. This list is updated when you restart Notes.

Bookmarks

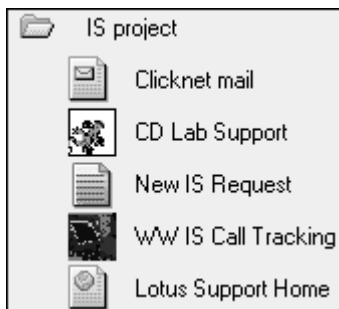
Bookmarks

Tips

- Use multiple copies of the same bookmark in different folders, when that same information is important in different projects.
- Add blank documents to the Create folder in the More bookmarks folder.
- Creating links to single documents saves you time when you need to refer to that document source.
- Create links to important mail messages. A single click then opens the message, without locating the message in your mail database.

Using Bookmarks effectively

Bookmarks allow you to group related information in a single folder.



A bookmark folder might contain all the links relevant to one project.

- Databases (reference, TeamRoom, discussion)
- Web sites and articles
- Specific documents or frequently used forms
- Mail messages

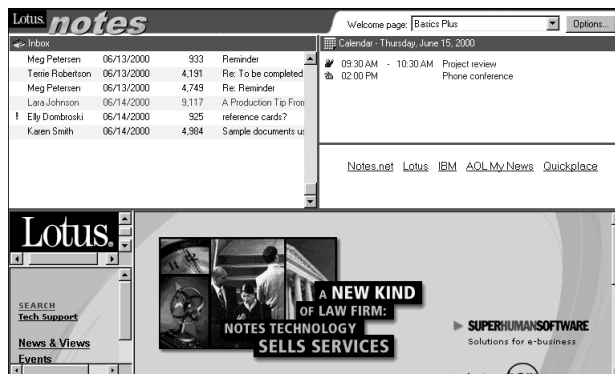
Home Page

Tips

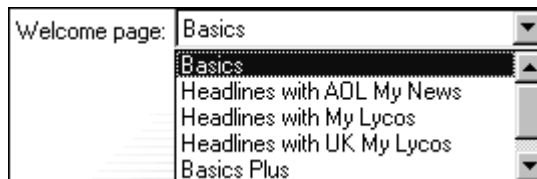
- Everything on the Welcome Page is a live link, including the title bars of each frame. For example, clicking the title bar above Calendar opens the full Calendar display.
- A database (such as your mail) or Web bookmark can be your designated home page. When you right click a bookmark icon, the menu selection is Set Bookmark as Home Page.

Choosing information for your Welcome Page

The default Welcome Page contains links to the basic information and tasks you use. You can choose to have the Welcome page display your mail Inbox, daily calendar appointments, and public information from the Internet, such as stock quotes or local news.



Notes R5 comes with a set of predetermined Welcome Page styles.



Home Page

Tips

- If you have a database open in Notes, and you also have the same database displayed on the Welcome Page, you must refresh the Welcome Page to see any changes you make.
- If you cannot find the Welcome Page bookmark, choose File→Database→Open, and select bookmark.nsf. Drag the bookmark.nsf task window to your Favorite Bookmarks folder.

Creating a new Welcome Page

The Welcome Page can be changed to display different layouts and types of information.

To change the Welcome Page:

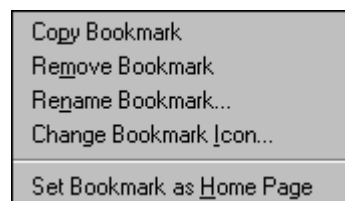
1. Open your Welcome Page.
2. Choose a style from the Welcome Page list in the upper right corner of the Welcome Page.
3. Click the **Options** button that appears next to the Welcome Page list, or choose **Create New Page Style** from the list. This opens the Page Options dialog box.
4. Click the **Basics** tab to enter a page title and choose the layout.
5. Click the **Content** tab, click inside each frame in the **Select a frame** section, and choose an item for the selected frames from the content list in the **Frame content** section.
6. (optional) If you choose Web page, do one of the following:
Select a Web page from the default list on the right.
Select **I want to type in the address** and type in the address in the Web address box.
7. (optional) If you choose Quick links, and would like to add your own links, click **Edit** on the right. Then click **Clear** next to the default selection(s) you want to erase in the Quick Links dialog box, and add a new Web page name and URL.

Tips

- If the database that you want for a home page is not bookmarked, first open it, and then drag the task button to the bookmark bar.
- To reset the default Welcome Page as your Home Page, right click the Welcome Bookmark in the Favorites Bookmarks folder.

Setting a bookmark as your home page

Once you have bookmarked a database, document, or a Web page, you can set that bookmark to open every time you start Notes. This can be reset as often as you like. You can also reset the Welcome Page to act as your home page.



Home Page

To set a bookmark as the home page:

1. Right-click on any bookmark.
2. Select the **Set Bookmark as Home Page** option.
3. In the Set Home Page dialog box, click **OK**.

Databases

Tips

- When you double click the database name, a bookmark is added to the Databases bookmarks folder.
- If you select a database from the list and click Open, a bookmark will not be created.
- You can select a database and click Bookmark, then choose the location for the new bookmark.
- To reopen an About This Database document, choose Help→About This Database.
- There is a separate document, Using This Database, that may contain user tips and instructions.

Databases

Opening a database

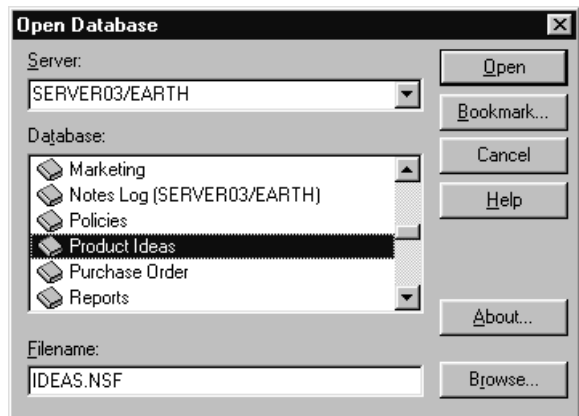
To open a database, click the database bookmark icon.

The first time a database is opened, the **About This Database** document opens in a separate task window.



To open (and bookmark) a database not already saved as a bookmark:

1. Choose **File→Database→Open**.
2. From the Server drop-down list, select a server name.



3. From the Database list, double click a database name.

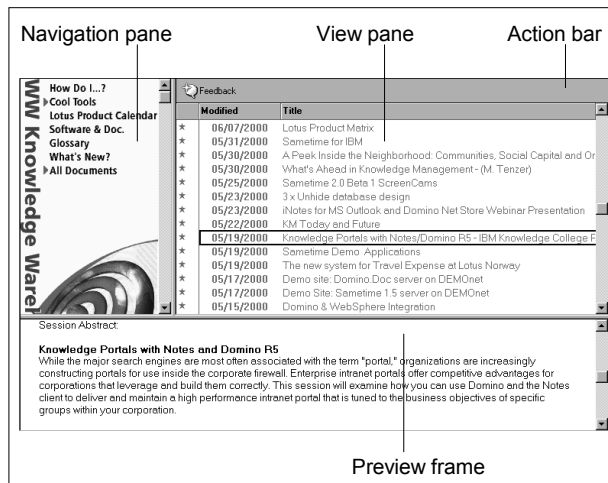
Tips

- The navigation pane may include a graphical navigator.

Navigating a database

A Notes database is a collection of documents that is also used to manage related information. A Notes database generally contains information about a single area of interest, such as a new product, a set of industry news items, or all the processes, forms, and policy for a department.

An open database contains views, panes, and folders.



Databases

Use this

Navigation pane

To

List the available views and folders.

View pane

Display documents in the currently selected view or folder.

Action bar

Perform tasks with related action buttons.

View

Display a selection of documents.

Folders

Store and manage related documents.

Tips

- The refresh icon indicates there are updates to that database view. You can refresh the view by clicking the refresh icon at the top of the view, or by pressing F9.



Databases

Using Views

The contents of the database are displayed in a list, called a view. Each line in the View pane represents a document. Each view changes the order and categories of the display of documents. You use the gutter to the left of all the columns to select documents.

	Date ▲	Topic
✓	04/24/2000	Release News (Jerrie Lyn Paniri)
★	04/19/1999	The Etiquette of Participating in a Discussion (Andrea Jones)
★	03/29/1999	Using IBM Notepad on the Road (Robert Smith)
✓	03/08/1999 1	▶ Expense forms (Mary Davis)
✓	03/08/1999	For Your Review: Champions (Mary Davis)

A triangle next to a line in the view means that there are subsets of documents beneath it. Clicking the triangle expands or collapses the documents.

Within a database view there are discussion threads, showing the documents grouped with their response documents.

2	▼ Workshop Ideas for Regional Sales Conference (Andrea Jones)
	▼ Additional topics (Mary Davis 02/23)
	Idea Generation (Andrea Jones 02/23)

Exploring Notes applications

Many Notes databases are based on templates designed for different purposes. For example, a Document Library database is an electronic filing cabinet that stores reference documents for access by a workgroup. You can create new databases based on a template.

You have access to two unique types of database templates, TeamRoom and Personal Journal.

TeamRoom is a Lotus Domino application designed to support processes that help people work together. This database is a place for discussions, sending documents through a review cycle, sharing content, and tracking project milestone dates.

Personal Journal is a database that is designed to store private documents. You can use the personal journal as a holding place for documents that aren't ready to be distributed to others.

To create a journal:

1. Choose **File→Database→New**.
2. Choose Local as your server in the Server field.
3. Type a name for your personal journal database in the Title field.
4. Specify a file name for your personal journal.
5. Choose the Personal Journal template from the list of templates.

Databases



Tips

- You can save a search (and results), or load a previously saved search.
- To quickly find a particular document or category, just type the text, or the first part of the text, that the document is sorted by. The Starts with dialog will open automatically when you start typing.

Searching a database

Once you have opened a Notes database and are in a view, you can search the text and titles of all the documents in that view. When the database is indexed, you also have access to features which allow you to refine or expand your search, and you can get results sorted by how close they are to what you are looking for.

To search a database:

1. Open the view you want to search.
2. Click the **Search** icon to open the search  bar.
3. Enter the text in the **Search for** field, then click Search. Once the search results are displayed, you can open the documents listed.
4. Click **Clear** to clear the search results.
5. Close the search bar by clicking the  close box.

Tips

- The documents within a folder are actually pointers to the actual documents in the database. When you delete a document from a folder, it is physically removed from the entire database.
- To remove a document from a folder, choose **Actions→Folder→Remove From Folder**.

Using database folders

Folders let you store and manage related documents. You can drag documents to them and double click them to view their contents.

To move a document to a folder:

1. Select the document you want to store.
2. Choose **Actions→Move to Folder**.
3. Click a folder name in the **Select a folder** list to use an existing folder. If you need to create a new folder, click **Create New Folder**.
4. Click **Move** to put the document into a folder and remove it from other folders, or click **Add** to put the document into a folder without removing it from other folders.

Mail

Tips

- To go to the next message in a view or folder, you can use the navigation SmartIcons, or press Enter.
- Unread messages appear in red and have red stars in the column to the left of the message.
- When reading mail, you can copy the sender's address to your Address book (Actions→Tools).

Reading your mail

When you open your Mail, the first message in the view is selected. You can open a message to read it, or preview it.

	Who	Date	Size	Subject
	Mary Davis	04/10/2000	64,466	New format for expense reports
★	Mary Davis	03/31/2000	474	Passing the certification exam
★	Mary Davis	03/31/2000	547	Re: Creating the post-sales debriefing
	Ann Reed	12/21/1999	481	Delegated: Monthly forecast meeting
	Ann Reed	12/21/1999	384	RECEIVED: Invitation: Monthly forecast

- To open a message, double-click the message.
- To open a message in the preview pane, click the message and then drag the bottom of the mail window up to open the preview pane.

Mail

Tips

- When replying to a message, you can add additional names in the header, and add comments to the original message.
- Make your replies stand out with Permanent Pen and Highlighter to emphasize text.

Replying to messages

You can reply to the sender of a message or to the sender and all recipients of the message. You can also include the original message in your reply.

To...

Reply to the message

Reply to the message and include the original message in the reply

Reply to the message and send it to all recipients of the original message

Reply to the message, include the original message, and send it to all recipients of the original message

Do this

Click **Reply** and choose **Reply**.

Click **Reply** and choose **Reply with History**.

Click **Reply** and choose **Reply to All**.

Click **Reply** and choose **Reply to All with History**.


Mail

Tips

- Notes deletes messages from all folders and views in your mail database.
- Delete is a toggle switch. If you select a message already marked for deletion, the message is unmarked.
- To remove a message from a folder without deleting it from your mail database, select the message, click Folder, and choose Remove From Folder.
- If you inadvertently remove a message from a folder, it will still be listed in the All Documents view.
- You can open the Trash folder in your mail database and delete or restore the documents from there.
- You can change User Preferences to empty the trash whenever you close the mail database.




Deleting unwanted mail

Messages marked for deletion remain in the Inbox until the trash is emptied. When you click the Delete button while reading a message, it is marked with a Trash icon, and the next message is opened.

	Mary Davis	03/31/2000	474	Passing the certification exam
---	------------	------------	-----	--------------------------------

To delete one or more messages:

1. Open your mail and select each document you want to delete.

	Who	Date	Size	Subject
✓ 	Mary Davis	04/19/2000	1,463	Post Project review
✓ 	Mary Davis	04/10/2000	64,466	New format for expense reports
✓	Mary Davis	03/31/2000	474	Passing the certification exam
★ ✓	Mary Davis	03/31/2000	547	Re: Creating the post-sales debriefing
✓ 	Ann Reed	12/21/1999	481	Delegated: Monthly forecast meeting

2. Click **Delete** to mark the message for deletion. Notes displays a trash can next to the message.
3. Press **F9** to refresh your mail, and select Yes when asked if you want to delete the documents.

Tips

- To change your mail letterhead, modify your mail preferences.
- If you close a memo without sending it, you are prompted to send, save, or discard the message.
- Unfinished messages can be saved in the Drafts folder.
- You can create mail from another open message, calendar entry, or to do item, by clicking Copy Into, and choosing New Memo. The subject and body from the original document is copied into the new message.
- The mail header is non-scrolling; that is, it remains visible as you scroll down a message.

Create a message

There are several ways to create a mail message in Notes.

- The **New Memo** action button in your mail database
- The **New Memo** link on the Welcome Page
- The **New Memo** link in the Create folder within the More Bookmarks folder
- The **Create** menu

To create a new message:

1. Open your mail and click **New Memo**.
2. Address the message in the To, cc, and bcc fields.
3. Type a subject in the Subject field.
4. Click the body of the message and type your message.
5. Send the message.

Mail

Tips

- When spelling errors are detected on a message you are sending, the Spell Check dialog box is displayed. You can change or skip each noted error, stop spell check (which cancels sending the message), or send the message without checking for additional misspellings.
- If Spell Check is not enabled for outgoing messages, you can spell check individual messages by selecting that Delivery Option.

Checking outgoing mail for misspellings

Your outgoing mail can be automatically checked for spelling errors.

To Spell Check your messages:

1. Open your mail, click **Tools**, and choose **Preferences**.
2. Select **Automatic Spell Checking**.

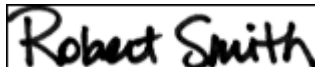
The screenshot shows the 'Mail' tab selected in the top navigation bar. Below it, the 'Basics' sub-tab is active. The 'User Configuration' section contains a dropdown menu labeled 'This mail file belongs to:' with the value 'Robert Smith/EARTH' and a small downward arrow. Below this is the text '(Use your hierarchical name, e.g. John Doe/Organization)'. The 'Spell Checking' section is below, featuring a checkbox labeled 'Automatically check mail messages for misspellings before sending', which is currently checked with an 'X'.

Tips

- A Signature can be added to an individual message by clicking the **Tools** button and choosing **Insert Signature**.

Adding a signature to outgoing mail

You can add a text signature to the bottom of messages that you send. You specify the text or file that will be the appended signature, and enable it on all outgoing messages.

A rectangular box containing a handwritten signature in black ink that reads "Robert Smith".

To add a signature to messages:

1. Open your mail, click **Tools**, and choose **Preferences**.
2. Click **Signature** and specify the text in the Signature box, or select **File** and specify the file that contains the text you want.
3. Select **Automatically append signature to my outgoing e-mail messages**.

Mail

Tips

- You can also use drag & drop to copy or move a message to a folder.
- While moving a message you can create a new folder.

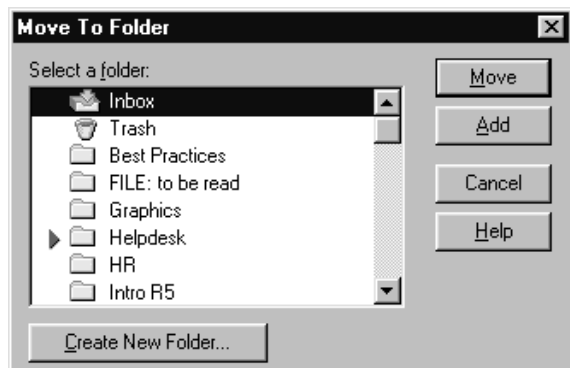
Moving a message

When you are using a folder (such as the Inbox) in your mail database, you can move a message from it to another folder. You can also add a copy of the message to another folder without moving it from the original folder.

However, you can only add copies of messages from views (such as All Documents or Sent) to other folders.

To copy or move a message to a folder:

1. Click the message. To copy or move more than one message, click the column to the left of each message to select it.
2. Click Folder and choose **Move To Folder**.
3. Click **Add** to add a copy of the message to a folder, or click **Move** to move it from the current folder to another.



Tips

- You can forward a Web link through mail. With the Web page open in Notes, choose Actions→Forward, and select to forward the link, which is entered into a new memo. The recipient sees this as an active URL.

Forwarding information

Any document, message, or invitation can be forwarded. The new memo contains the text from the original document.

Send Send and File Save As Draft Address... Delivery Options...

Mary Davis
06/07/2000 06:19 AM

To: Ann Reed
cc:
bcc:
Subject: For Your Review: Champions

Ann, I thought you might be interested in reading this - Mary
----- Forwarded by Mary Davis/EARTH on 06/07/2000 06:34 AM -----

overview
overview

The information provided for you here is designed to help you make a compelling case. Chan have seen how it provides world class messaging capabilities, automates and simplifies comp possible but easy. The information here is to help you grow our client community, leverage no

Mail

To forward a document:

1. Select the document or message.
2. Click **Forward**.
3. Enter the address and any additional text to the message.
4. Send the message.

Tips

- You can also save a message in a folder when you send it. By clicking Send and File you can select the folder in which you want to save the message.

Saving messages

Messages you send are saved in the Sent view. User Preferences allows you to change settings so that Notes always keeps a copy of each message you send, or prompts you if you want to save each message when you send it.



To enable mail save options:

1. Choose **File→Preferences→User Preferences**.
2. Click the **Mail and News** icon.
3. Under the Sending section, select any of the options in the **Save sent mail** drop-down list.

Tips

- Enable or disable a selected rule using the action buttons.
- Notes uses rules in the order in which they appear from top to bottom, so you can move the rules with higher priority closer to the top. This way, if a new message you receive meets the criteria of two different rules, the rule that's closer to the top acts on the message first. (This is particularly important if you have rules that move or delete messages.)

Filtering incoming messages

You can use mail rules to have Notes act automatically on new messages you receive that meet certain conditions. For example, you could create a rule that checks for messages from a certain sender or that contain a certain subject and have Notes automatically move the messages to a certain folder.

Notes stores the mail rules you create in the Rules folder in your mail database. You can add new rules, edit existing rules, change their order so that one rule has priority over another, disable them, or delete them entirely.

The screenshot shows a dialog box for configuring a mail rule. It is divided into three main sections: conditions, actions, and a list of actions.

- When mail messages arrive that meet these conditions:**
 - When:** Sender contains Ann Reed
- Specify Actions**
 - change importance to High
- Perform the following actions:**
 - change importance to High

Mail

Filtering incoming messages...

To create a mail rule:

1. Open the **Rules** folder in your mail database.
2. Click **New Rule**.
3. Under **Specify Conditions**, select which part of a message to check, select a state, and type the criteria to check for.
4. Click **Add**, and then repeat steps 2 and 3 to add more criteria.
5. Under **Specify Actions**, select move to folder, copy to folder, change importance to, or delete.
6. Click **Add Action**, and then repeat step 5 to add more actions.

Mail

Tips


- When you click **Browse** to pick a sound for mail notification, Notes displays the .WAV files stored in the default Windows sound directory (C:\<Windows System Directory>\Media).

Checking for new mail

To enable new mail notification while working in Notes, you need to modify your User Preferences. Choose the interval at which Notes checks for new messages, and select visible or audible notification. You can also select a sound. There is a pop-up menu under **Audible Notification** with options for you to choose.

You can use Notes Minder to check for new mail without starting Notes.

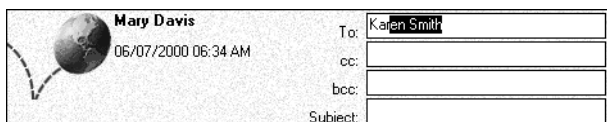
To change Notes Minder settings:

1. Start Notes Minder.
-  2. Right-click the **Notes Minder** icon in the Windows task bar and select **Properties**.
3. Do one of the following:
 - Select **Audible Notification** to have Notes Minder make a sound when you have new messages.
 - Select **Visual Notification** to have Notes Minder display a dialog box when you have new messages.
4. Enter the number of minutes at which Notes checks for new messages.
5. Select or deselect **Disable checking** to disable or enable **Notes Minder**.

Mail

Finding an address

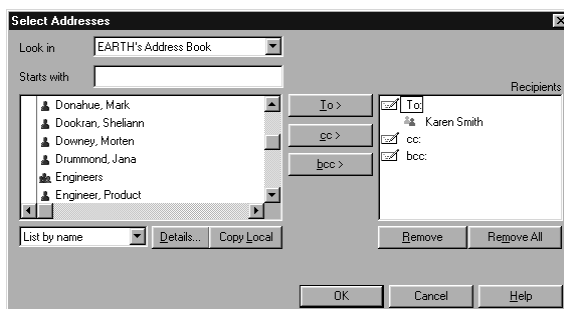
When you type addresses manually, Notes displays the first name it finds that matches the letters you type so that you can select a name rather than type the entire name. If you type more than one name in a field, press ENTER after each name, or separate the names with commas.



The screenshot shows the header of an email in Lotus Notes. On the left, there is a small globe icon and the text 'Mary Davis' followed by the date and time '06/07/2000 06:34 AM'. On the right, there are four input fields for the email header: 'To:' with 'Karen Smith' entered, 'cc:', 'bcc:', and 'Subject:'.

To select an address for a message from an address book:

1. Open the message and click **Address**.
2. Use the **Select Addresses** dialog box to choose names from an address book.



3. Select the name and click the appropriate field.

Tips

- Use Advanced options for setting abbreviated Internet names, establishing categories, and choosing the background display.

Creating a contact in the address book

Notes saves information about people in Contact documents in your address book. You can send mail to people and invite people to meetings from your address book. If you save a person's Web page, you can also visit the page from your address book.

Address Book		Add Contact Delete Directories Write	
Contacts	A	Name	Phones
Contacts by Category	B	Donahue , Mark	Office phone: x5511
Groups	C	Dookran , Sheliann	
	D	Drummond , Jana	
	E		

To add a person to the address book:

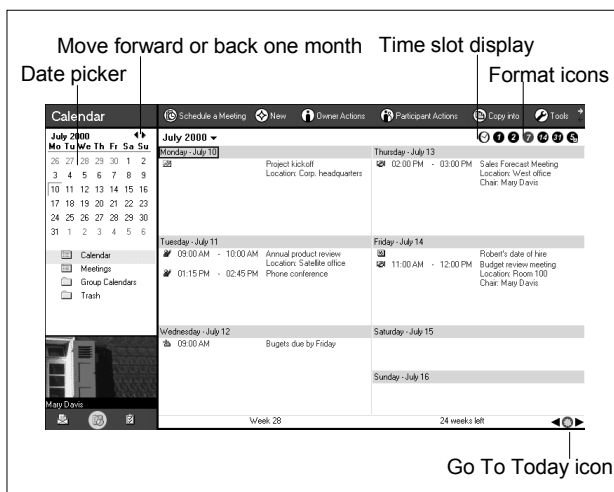
1. Open your address book and click **Add Contact**.
2. Specify the person's name under **Names**.
3. Type the person's mail address in the e-mail address field. Click the button to the left of the field to select the type of mail the person uses.
4. Specify any other information about the person that you want to save, on the Basics, Details, and Comments pages.

Mail

Notes Calendar




Checking your calendar

To open your calendar, click the calendar icon on the Bookmark Bar. Your calendar is displayed with a monthly layout (called the date picker) in the top-left corner. You can change the number of days displayed in the main calendar view.



Checking your calendar...

To move around the calendar:

To	Click
Go to a date	The date on the date picker.
Move the date picker back or forward one month	An arrow icon on the top right corner of the date picker.
Go to the current date	The sun icon in the lower right corner of the calendar. 
Move the calendar back or forward one page	An arrow icon on the bottom right corner of the calendar (or press Page Up or Page Down).
Display the calendar in one-day, two-day, one-week, two-week, one-month, or work week format (days that you specify).	The corresponding format icon. 
Display time slots	The clock icon. 

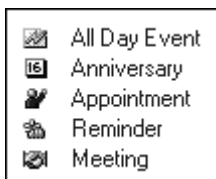
Notes Calendar

Tips

- You can also add holidays to your calendar, by clicking the Tools button, and choosing Import Holidays. Select the holiday sets to add.

Adding calendar entries

There are different types of calendar entries.



To...

Create...

Schedule a period of time for yourself	An appointment
Invite others to meet with you for a period of time	A meeting invitation
Schedule a specific, annual date (such as a birthday) for yourself	An anniversary
Remind yourself of something at a specific time	A reminder
Schedule a day or period of days for yourself	An all-day event
Assign a to do item to yourself or others	A to do entry or request

Tips

- A calendar entry can be set to automatically repeat daily, weekly, monthly, or yearly.
- When you select **Notify me**, you choose when the alarm should go off, what should be displayed, and the alarm sound that will be played.
- Changes to your calendar may not be displayed until you click the refresh button that appears to the left of the format icons.

Creating a new entry

When you create entries in your calendar, you choose the type of entry, beginning and ending dates and times, and specify option settings for repeating entries, privacy, and alarms.

To create a calendar entry:

1. Open your calendar, click **New**, and select **Appointment**, **Anniversary**, **Reminder**, or **Event**.
2. Enter a brief description in the **Subject** field.
3. Specify a start date and/or time in the **Begins** field(s). If necessary, specify a date and/or time in the **Ends** field(s).
4. Enter a location in the **Location** field. This will be displayed with the subject on the calendar.
5. Enter information in the **Description** field. This is a rich text field, so you can add information such as text, document links, attachments, objects, and pictures.


**Notes
Calendar**

Tips

- When you Save and Send an invitation, Notes adds a copy of the invitation to the Calendar view, marks the specified time busy in your free time schedule, and sends a mail message to each of the people you specified.
- If you don't want to keep invitations in your Inbox, open your Calendar Preferences, and on the Autoprocess page select Remove meeting invitations from my Inbox after I respond to them.
- You can keep track of responses from your copy of the invitation, or specify that you don't want meeting replies to show in your mailbox.
- Look up free time of invitees by clicking Scheduler, and choosing Check all schedules.

Inviting others to a meeting

When you create a meeting invitation and send it to other people, Notes adds an entry to your Calendar view and the Meetings view, and sends a mail message to each person you invite.

	Who ▲	Date	Size ▼	Subject
★	 Mary Davis	06/08/2000	785	Invitation: Sales Forecast Meeting (Jun 15 02:00 PM EDT in West office)

To create a meeting invitation:

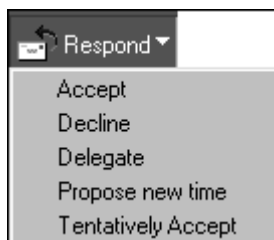
1. Open your calendar and click **Schedule a Meeting**.
2. Enter a brief description in the **Subject** field.
3. Specify dates and times in the **Begins and Ends** fields.
4. Click **Meeting Invitations & Reservations**, and enter the names of the people to receive the invitation. You can also reserve rooms and resources.
5. Enter any information in the **Description** field.

Tips

- When you accept an invitation, it is added to your calendar.
- If you receive an invitation that does not require a response, use Add to Calendar to add it to your calendar.
- To allow meeting invitations to be accepted automatically, change Calendar Autoprocess preferences.
- You can counter-propose a meeting invitation, but you cannot immediately counter-propose a repeat meeting invitation. First you must accept the invitation, then respond to the first entry of it in your calendar.

Responding to a meeting invitation

When you open a meeting invitation you will see if the sender expects a response from you. If the meeting owner allows it, you can delegate the invitation to someone else, or propose a new time. When you answer a meeting invitation, Notes sends a notice with your answer to the person who sent it to you.



To respond to an invitation:

1. Open the invitation.
2. Click **Respond** or **Respond with Comments**, and accept or decline the invitation.

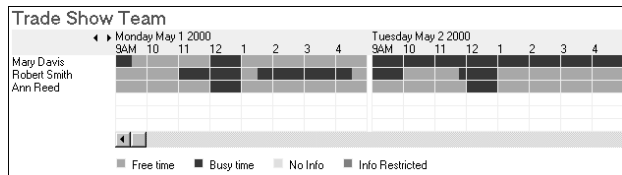
**Notes
Calendar**

Tips

- If one of the people you select for a group calendar has given you calendar access, you can click the person's name on the group calendar to open that person's calendar in the pane below.
- If the person is busy, click the time slot. Notes displays the calendar entry that occurs at that time.

Setting up a group calendar

A group calendar is a collection of the free time schedules of the people you select. If you have access to people's calendars, you can display their calendars in the pane below the group calendar.



To create a group calendar:

1. Open your calendar and click **Group Calendars**.
2. Click **New Group Calendar**.
3. Type a title, then specify the names of people or groups in the **Members** field. To select names from an address book, click the box after the field.

Tips

- You can preview the calendar before printing it.
- To print individual calendar entries, first select the entries, and in the Print dialog box select Print selected documents.

Printing your calendar

You can print your calendar in a variety of styles.

Option	Description
Daily Style	Prints one day per page.
Weekly Style	Prints one week per page.
Monthly Style	Prints one month per page.
Work Week Style	Prints whatever the Work Week view is set to. Default is a five-day week, Mon.-Fri.
Calendar List	Prints calendar entries in a single list.
Trifold Style	Prints daily, weekly, and monthly in trifold panels. Works best in landscape mode.

There are custom page types available for printing, such as Day-Timer or Franklin Planners.

**Notes
Calendar**

To Do List

Tips

- When you mark an entry complete, a green check mark appears next to the entry in the list.
- To Do items are marked for deletion by selecting the entry and pressing Delete. Pressing F9 refreshes the To Do list by permanently removing the items from the trash.

To Do List

Creating and managing tasks

To open your To Do list, click the To Do icon on the Bookmark Bar.



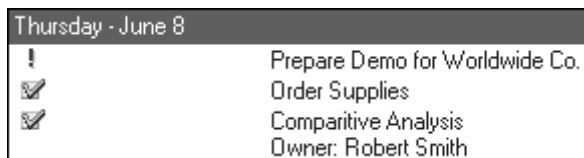
When you create a to do entry for yourself, Notes adds it to your To Do list. Tasks can be prioritized, and listed after you have completed them.

To create a To Do task:

1. Open your to do list, and click **New To Do Item**.
2. In the **Type** field, select **Personal To Do**.
3. Enter a brief description in the **Subject** field.
4. Enter starting and due dates, and priority level.
5. Enter any information in the **Description** field. This is a rich text field so you can add information such as text, document links, file attachments, objects, and pictures.

Displaying tasks on your calendar

To Do tasks can be displayed on your calendar. Modify calendar preferences to enable or disable the display option.



To display tasks on the calendar:

1. Open your **To Do** list, click **Tools**, and choose **Preferences**.
2. Click **Calendar** and then **To Do**.
3. Select **Always show current To do's on today's calendar**.

To Do List

Tips

- When you reschedule, cancel, or confirm a request, Notes sends a notice to the people to whom you sent the request.

Assigning a group task

You can create a To Do request and send it to other people. When you create a to do request for others, Notes adds an entry to your to do list and sends a mail message to each person you specify.

Recipients may be allowed to respond to a To Do request, or just have the option to add it to their own To Do list.

Basics	Participants	Options
Enter new assignments below		
Assign to: Ann Reed/EARTH, Mary Davis/EARTH,		
cc:		
bcc:		
Description: Create sales presentations for our department meeting in August.		

To create a group task:

1. Open a new To Do item.
2. In the **type** field, select **Group To Do**.
3. Enter a brief description in the **Subject** field, starting and due dates, and a more detailed description.

To Do List

Documents

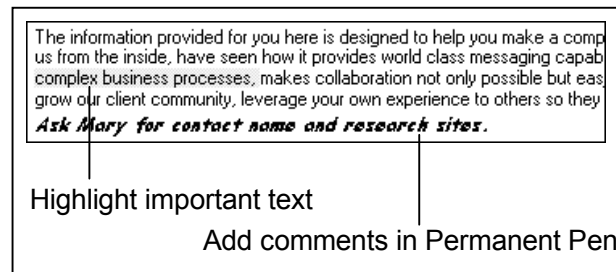
Tips

- While highlighter is enabled, you cannot select text.

Using pens and highlighters

The permanent pen allows you to make text stand out by changing the color and font. The default permanent pen font is red bold, but you can customize it to your preference. The options for setting and using permanent pen are on the Text menu. Deselecting the same option disables it.

You can also highlight text in a document using a highlighter pen, also available from the Text menu. When using highlighter, you drag the pointer left to right to highlight text. To remove a highlight, drag the pointer left to right over the highlighted text.



Tips

- The express icon toggles the properties display between full properties and express.
- To make changes to a document, it must be open in Edit mode.

Formatting with text properties

You edit the style of a document using property boxes. If you click the express icon in the top right corner, the properties box changes to an express toolbar, containing the most commonly used tools for editing.



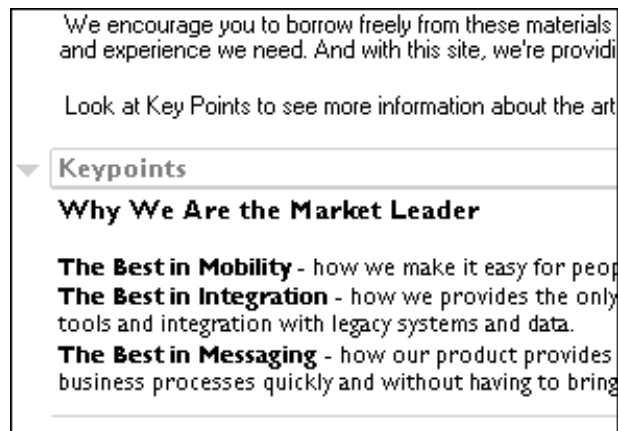
Documents

Tips

- By default, a section title is the first line of text in the section, although you can change the section title in section properties.
- Carriage returns are not allowed in section titles.
- You can specify if a section will automatically expand or collapse when the document is opened or printed.
- If you remove a section (Section→Remove Section), the content remains in the document.

Organizing content into sections

A section condenses paragraphs in a document to a single line. This conserves space and lets readers decide when to expand and read the information within a section.



To create a section:

1. Select the paragraph(s) to collapse into a section.
2. Choose **Create→Section**.
3. Choose **Section→Section Properties** to modify the section title, border, and color.

Documents

Tips

- Non-standard rows print as standard tables.
- Formatting properties control cell size, alignment, borders, colors, and special effects.
- It is possible to create a table within a table.

Creating tables

You can create tables within Notes documents. You must be in a rich text field (a field that allows text, objects, file attachments, and pictures) to create a table.

Your table styles can be standard rows and columns, tabbed rows that allow reader interaction, or set to display a different row every few seconds.

Curriculum	Lotus Authorized Curriculum ensures individuals get up to speed quickly and effectively whether delivered in the classroom, on the desktop, or via distributed learning.
Certification	Lotus Certification programs certify individuals who can demonstrate a level of skill and expertise with the Lotus technology.
Technology Based	Learn more about Distributed Learning, Computer-based training, and other technology-based training.

Curriculum	Certification	Technology Based
Curriculum	Lotus Authorized Curriculum ensures individuals get up to speed quickly and effectively whether delivered in the classroom, on the desktop, or via distributed learning.	

To create a table:

1. Click the place where you want the table to appear.
2. Choose **Create→Table**.
3. Click the standard table button in the **Table Type** section.



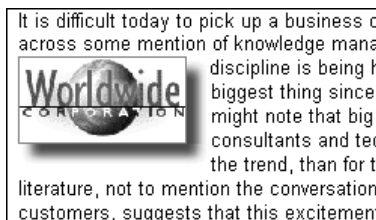
4. Specify the amount of rows and columns in the **Table Size** section.

Tips

- You can also import graphics using File→Import.
- To replace an existing picture with another graphic, select the picture and choose Picture→Replace Picture.

Adding pictures

You can copy or import graphics into a document, and modify picture properties to add border and shadow effects. You specify how text wraps around the picture.



To add a picture:

1. Choose **Create→Picture**.
2. Select the location of the graphic file, the type of file (such as BMP or GIF file types), and the graphic you want to import.
3. Choose **Picture→Picture Properties** to modify placement, scale picture size, and add borders and shadow effects.

Internet Access

Tips

- Click the pushpin icon to keep the URL address box open.
- It is not necessary to enter the protocol prefix (http://, for example) of a URL; to open a World Wide Web page you can start with the www.
- Click the word Notes in the upper right of the windows task bar to go directly to Lotus.com.

notes

Opening Web pages within Notes

Within Notes, you can go directly to a particular Web address and use the navigation buttons to go back and forward while browsing. Web pages open in task windows.



To open a Web page:

1. Click the **Open URL** icon (the globe in the upper right corner of your screen) to open the entry field.
2. Enter a URL in the Address box, or choose a URL from the drop-down list.



Tips

- To disable Page Minder, open Internet Options, click the Page Minder tab, and click Enable Page Minder.
- To run Page Minder on a particular Web page, first open the Web page, choose Actions→Move to Folder, click the green arrow next to the WebBot folder, click the Page Minder folder, and then click Add.

Tracking Web pages

You can have an agent called Page Minder monitor a Web page and notify you when the contents change.

To enable Page Minder agents:

1. Open **User Preferences**.
2. Under **Startup Options**, select **Enable scheduled local agents**.
3. Open any Web page and choose **Actions→Internet Options**.
4. Click the **Page Minder** tab and click **Enable Page Minder**.
5. Specify how often to check if page contents have changed, how you want to be alerted of changes, and the names of people to alert when the content changes.

Tips


- You can start an Internet search for a particular topic from the Welcome page.
- Use the Stop button to stop loading a page from the Internet.

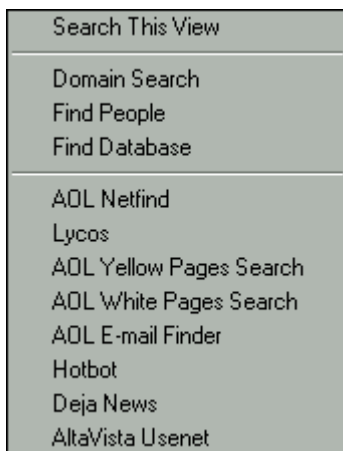


Searching the Web with Notes

Within Notes, you can start any one of several popular Internet search engines.

To start a Web search:

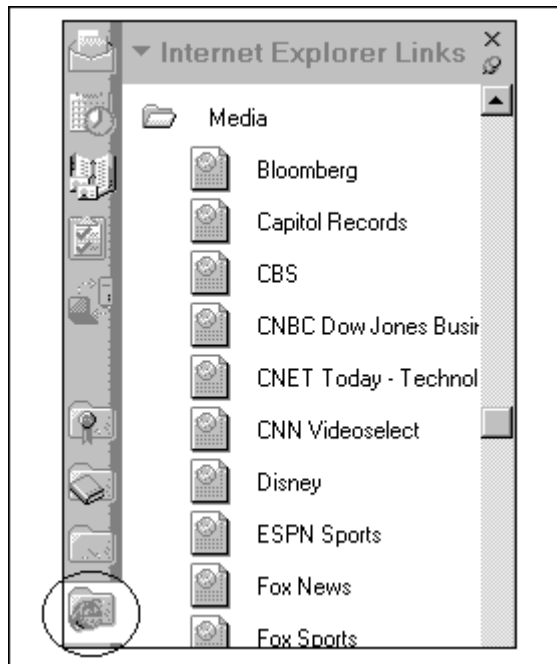
1. Click the down arrow next to the Search  button (the magnifying glass in the upper right corner of your screen).
2. Choose the Internet search engine from the list.



Using your browser bookmarks

You can access your browser bookmarks from either Netscape Navigator or Internet Explorer, depending on which browser you use.

Open the Internet Explorer or Netscape folder on the Bookmark Bar.

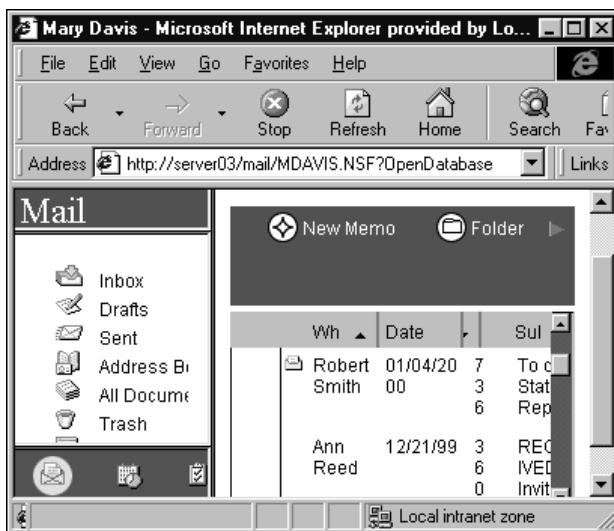


**Internet
Access**

Getting your mail with a browser

Depending on how your Domino administrator sets up your Notes mail file, you may be able to read and work with Notes messages using a Web browser (such as Microsoft Internet Explorer or Netscape Navigator) in addition to, or instead of, the Notes client.

When you access your mail with a browser you can perform most functions in your mail, calendar, and To Do list.



To access your mail database with a browser:

1. Open your browser.
2. Enter the URL for your mail file (for example, <http://company.name.com/mail/bmurray.nsf>).
3. If necessary, specify your user name and password.

A

- Address book
 - adding a person 34
 - finding an address 35
- Addressing mail 33
- Appointments 39–41

B

- Bookmarks 8–12, 15
 - creating a bookmark 9
 - creating links 12
 - how to use 12
 - keeping track of 10–11
 - removing a bookmark 8
 - setting a bookmark as your home page 15
- Buttons
 - navigation buttons 4
 - new Memo 25
 - SmartIcons 5

C

- Calendar 2–3, 36–45
 - creating calendar entries 38
 - creating new entries 39
 - dates 3
 - displaying tasks 45
 - group calendar 42
 - meeting invitation 40
 - moving around the calendar 37
 - opening 2
 - printing 43
 - responding to an invitation 41

D

- Databases 16–21
 - elements of a database 17
 - exploring Notes applications 19
 - navigating databases 17
 - opening a database 16
 - searching a database 20
 - using folders 21
- Documents 47–51
 - adding pictures 51
 - creating tables 50
 - editing and formatting 48
 - organizing 49
 - using permanent pen and highlighter 47

E

- E-mail access with a Web browser . . . 56

F

- Folders
 - using in a database 22
- Formatting 44–46

G

- Graphics 51
- Group calendars 42

H

- Help
 - how to use 6–7
- Home Page 13–15
 - creating a new Welcome Page 14
 - setting a bookmark as Home Page . . 15

I

- Internet access 52–56
 - from Notes 54
 - monitoring 53
 - opening Web pages 52
 - using browser bookmarks 55
- Invitations
 - inviting others to a meeting 40
 - responding to 41

L

- Lotus Education Web site v

M

- Mail 2–3, 22–35, 55–56
 - accessing with a browser 55
 - addressing 35
 - checking for new mail 33
 - copying 28
 - creating a mail message 25
 - deleting mail messages 24
 - filtering mail with rules 31–32
 - finding addresses 34
 - folders 28
 - forwarding information 29
 - new Memo 25
 - obtaining with a browser 56
 - opening 2
 - reading 22
 - replying to 23
 - saving 30
 - signatures 27
 - spell checking messages 26
 - working with open tasks 3
- Meeting invitations
 - answering an invitaiton 41
 - creating and sending a meeting invitation 40

N

- Navigation buttons 4
- Notes database 17

P

- Page Minder 53
- Personal Journal 19
- Pictures
 - creating a picture in a document . . . 51

S

- Searching
 - for information using Help 6–7
 - in a database 20
- Signatures 27
- SmartIcons
 - displaying the SmartIcons toolbar 5

T

- Tables 50
- Task management 44
 - displaying tasks on your calendar 45
- Text
 - highlighting 47
- To Do lists 44–46

V

- Views
 - using in databases 18

W

- Web bookmarks 52
- Web pages
 - tracking changes to 53
- Welcome page 13–14
 - creating a new Welcome page 14